

DEPARTMENT OF ADMINISTRATION
GENERAL SERVICES DIVISION
STATE PROCUREMENT BUREAU

www.mt.gov/doa/gsd



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05/02/08

STATE OF MONTANA
REQUEST FOR PROPOSAL ADDENDUM
RFP NO.: RFP08-1667R
TO BE OPENED: 5/15/08
TITLE: WRITING PROJECT

ADDENDUM NO. 1

To All Offerors:

Attached are written questions received in response to this RFP. These questions, along with the State's response, become an official amendment to this RFP.

All other terms of the subject "Request for Proposal" are to remain as previously stated.

Acknowledgment of Addendum:

The offeror for this solicitation must acknowledge receipt of this addendum. This page must be submitted at the time set for the proposal opening or the proposal may be disqualified from further consideration.

I acknowledge receipt of Addendum No. 1.

Signed: _____

Company Name: _____

Date: _____

Sincerely,

RHONDA R. GRANDY, Contracts Officer

Section Number	Question/Answer
5.0	<p>Q 1. Will we be able to <i>qualify</i> as a bidder if our cost proposal includes the overall cost for each task, the number of hours of each staff person assigned to the project, hourly rates for each staff person, but does not include “<u>fringe benefit rates</u>” or “<u>overhead costs</u>”?</p> <p>A 1. It is acceptable to not include fringe benefit rates or overhead costs, if indeed there are none.</p>
3.2.1	<p>Q 2. What is the estimated size of the corpus of letters and notices sent to multiple citizens and businesses referred to in 3.2.1., in terms of the <u>types</u> of letters that are sent out (i.e., underpayment, failure to file, errors, etc.) and that are to be reviewed. Are there 100 different types, 1000? We need this information in order to estimate the time required to “review ALL existing written correspondence”.</p> <p>A 2. The State expects the contractor to review an estimated 800 letters, to be apportioned among five divisions. There will be varying types of letters within each division.</p>
	<p>Q 3. Does DOR have performance measures already in use to identify specific areas of communication in which taxpayer compliance with “DOR desired response” is lacking? If so, what areas, and what measures (number of phone calls, lack of compliance/response rates, etc).</p> <p>A 3. The State has begun gathering response rate information on selected compliance letters. However, we do not have this information for the majority of our letters.</p>
	<p>Q 4. Are there estimates of the size of the corpus of ‘selectable paragraphs’ for analysis? 1000? More? Less?</p> <p>A 4. The State estimates that there are around 1,000 selectable paragraphs.</p>
	<p>Q 5. Does DOR have any documented “results” for the Writing Project training of 200 trainees? Are there course evaluations, follow-up surveys which would be accessible to the contractor? Are there any performance measures that might indicate effectiveness after workers in a unit have been trained? It is unclear what kind of data may have been collected.</p> <p>A 5. There are course evaluations, which rate the usefulness of the topics covered in the class. There are no performance measures or data collected. This is because the Writing Project has never been fully implemented (for example, employees have received writing training, but are still using computer-generated letters and paragraphs from our system).</p>
	<p>Q 6. Does a certificate of liability insurance need to be filed with the proposal itself? Or is to be provided for the contract if our proposal awarded?</p> <p>A 6. Documentation may be submitted with the offeror’s response but it is not necessary at this stage of the RFP process.</p>

	<p>Q 7. RWS Corporation is a regular corporation and conducts business in the state of Montana. We have been registered with the Secretary of State since 1996. Are we to submit proof of registration with this proposal, or is that a matter for the contract itself.</p> <p>A 7. Documentation may be submitted with the offeror's response but it is not necessary at this stage of the RFP process.</p>
3.2.1	<p>Q 8. In section 3.2.1 Task 1, it states that the contractor will be responsible for "reviewing all existing written correspondence." What is the estimated volume of the correspondence to be reviewed under the contract?</p> <p>A 8. The State expects the contractor to review an estimated 800 letters, to be apportioned among five divisions. There will be varying types of letters within each division.</p>
3.2.2	<p>Q 9. In section 3.2.2 Task 2, it states that the contractor will be responsible for "analyzing the current selectable paragraphs that are inserted into the department's computer-generated letters." What is the estimated number of items to be analyzed?</p> <p>A 9. The State estimates that there are around 1,000 selectable paragraphs.</p>
3.3.1	<p>Q 10. In section 3.3.1 Task 1, how long is the Effective Writing Class?</p> <p>A 10. The class is 8 hours.</p>
3.1	<p>Q 11. a) How many sessions of the original training have been conducted? b) Is the original contractor bidding on this RFP? c) Who within the department is driving this initiative to improve the current Effective Writing program (job function)? If senior management, what has been the response of all the other stakeholders? d) How would conditions ideally improve as a result of this program? e) What problems is the Department of Revenue experiencing that made management think a redesign is warranted?</p> <p>A 11. a) Twenty-two sessions have been conducted. b) This is not known. c) The agency's director is driving this initiative. The program is overseen by the Education & Training Unit Manager and the Public Information Officer. For the most part, department employees agree that this program is needed. d) We are hoping for better understanding for taxpayers and improved public relations. e) The problem is that the Writing Project has not been implemented to its full potential. We've taken some positive steps, but the bulk of our correspondence has not been rewritten.</p>

<p>3.2.1</p>	<p>Q 12. a) How many types of departmental letters are sent to citizens and businesses, and approximately how long are these documents (number of pages)? b) How many interviews should the contractor assume will need to be conducted with current Writing Project team members, business experts, and other key employees? And approximately how long would these interviews need to be? c) Should the contractor assume that coordination of these interviews will be arranged by the Department? How many trips to Montana do you anticipate will be required? d) Do you prefer that all interviews be conducted in person, or may some be conducted on the telephone? e) Would it be possible to interview several typical recipients of the correspondence to get input from them about how well the documents meet their needs?</p> <p>A 12. a) The State expects the contractor to review an estimated 800 letters. The majority of the letters are 1-2 pages long. b) This would vary according to the needs of the contractor. c) Yes, the interviews will be arranged by the department. The number of trips to Montana would vary according to the needs of the contractor. d) Interviews do not need to be conducted in person. Telephone interviews are acceptable. e) Due to Montana's laws on taxpayer confidentiality, we would not be able to provide any personal information about the typical recipients. We may be able to provide samples of unsolicited feedback we have received from taxpayers related to some of the letters.</p>
<p>3.2.2</p>	<p>Q 13. Approximately how many pages of "selectable paragraphs" will the contractor be reviewing?</p> <p>A 13. We estimate that there are around 1,000 selectable paragraphs.</p>
<p>3.2.2</p>	<p>Q 14. How much freedom do employees have in customizing the Department's computer-generated letters?</p> <p>A 14. The State would rate an employee's freedom to customize as "no freedom to some freedom."</p>
<p>3.2.3</p>	<p>Q 15. a) How many people are on the current Writing Project team? Who is included on this team (job function, number, etc.)? How objective are they in evaluating the current program? How receptive are the various Writing Project team members to instituting changes? b) As a group, are they committed to improving the program? c) How many division administrators and business experts should be interviewed for a comprehensive, objective evaluation?</p> <p>A 15. a.) The current team consists the Education & Training Unit Manager, the Public Information Officer, the Citizen Services Bureau Chief, an Attorney, and business experts as appropriate (at least one, could be several). The State will be assembling work teams within each division prior to the contractor's start date. For objectivity, each member serves a different purpose and brings a unique perspective to the team. All team members are open to</p>

	<p>changes that result in better taxpayer understanding.</p> <p>b.) There is a high commitment to improvement among the Writing Project members.</p> <p>c.) We would estimate that 15-20 employees would need to be interviewed.</p>
3.3.1	<p>Q 16. a) How long is the current Effective Writing class?</p> <p>b) How often is it given?</p> <p>c) Have the 200-plus employees who have attended the class thus far completed Evaluation Forms?</p> <ol style="list-style-type: none"> 1. If yes, is there a summary of the responses or does the contractor have to create that summary? 2. How long is the evaluation form (number of questions and pages) <p>d) May the contractor request typical writing samples of representative employees who have attended the Effective Writing class?</p> <p>e) Besides providing a written evaluation report, would the department like an in-person presentation of the contractor's findings and recommendations?</p> <p>f) Should the contractor assume that any actual program redesign and implementation will be carried out under a separate RFP? If "Yes," will the winning contractor be permitted to bid on that RFP?</p> <p>g) Who will be conducting the redesigned training program—the selected contractor, the original contractor, or departmental staff?</p> <p>A 16.</p> <p>a) The class is 8 hours.</p> <p>b) The class has been conducted 22 times in 18 months.</p> <p>c) Yes. We will provide a compiled summary of the course evaluations to the contractor. The evaluation form is one page in length. A copy is attached.</p> <p>d) Current letters will be provided.</p> <p>e) A written evaluation report will be adequate.</p> <p>f) The redesign and implementation will be undertaken by the department's Education & Training Unit.</p> <p>g) The department's Education & Training Unit will be conducting the training.</p>
3.3.2	<p>Q 17. Will the selected contractor deliver as well as design and develop the Advanced Training?</p> <p>A 17. The contractor will only be required to design and develop the training. The department's Education & Training Unit will conduct the training.</p>
3.3.2	<p>Q 18. If the contractor will be delivering the training, how many sessions will be conducted during the contract period?</p> <p>A 18. The contractor will not be delivering the training.</p>

Department of Revenue **Internal Training Evaluation**

Course:	Attendee Name (Optional):			
Date(s) of Training:	Hours: (Check one)	<input type="checkbox"/> All Day	<input type="checkbox"/> AM	<input type="checkbox"/> PM
Location:	Presenter(s):			
Please rank the following:				

	Excellent	Good	Fair	Poor
Course Content:	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Facility:	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
The Instructor(s):	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Materials:	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Presentation:	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4

Comments

Please hit "Enter" at the end of each line

The information I found most useable was: _____

One Suggestion for improving the course content: _____

Topics I would like to cover in following sessions: _____

Other Comments: _____

Thank you for your comments. We appreciate the opportunity they give us to improve training and better suit your needs.
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